

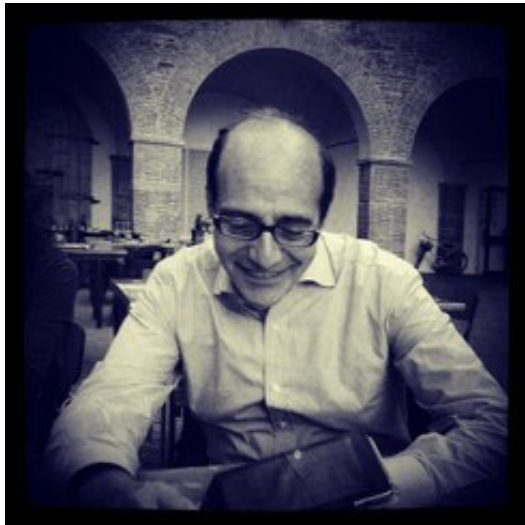
"TRAVEL 2.0 : digital marketing turistico"



ENTE PARCO NAZIONALE DELLA SILA

Lorica 21 giugno
2017

chi sono



Sono dirigente per le politiche del turismo presso il Ministero dei Beni e delle attività culturali e del turismo dal novembre 2014. In precedenza ho ricoperto il ruolo di senior marketing strategist in Fondazione Sistema Toscana , coordinando la dimensione del rapporto tra promozione pubblica e offerta turistica privata, con focus specifici sulla piattaforma di Booking online e la Toscana Card . Sono stato social media manager per un progetto del Gal Ogliastro . Inoltre ho collaborato con la Regione Umbria nel 2013/2014 per la redazione del piano di marketing online per cui ho elaborato il documento strategico.

Dal novembre 2009 a giugno 2014 ho rivestito il ruolo di dirigente a contratto con la Provincia di Grosseto, occupandomi della promozione e dello sviluppo del turismo nella Maremma Toscana e lavorando, in stretta connessione con la piattaforma on line www.intoscana.it della Regione Toscana . Per la Regione Toscana sono stato project manager del progetto interregionale “Terre degli Etruschi” .

Ho collaborato con la Luiss Business School ,SDA Bocconi, il Mumat dell'Università Cattolica di Piacenza, la Bologna Business School, la Scuola Superiore Maurizio Panti e in numerosi enti di formazione trattando la gestione 2.0 del mkt aziendale, il brand management, i temi legati al turismo sostenibile ed accessibile. Ho partecipato come relatore in BTO (per la quale ho collaborato al programma scientifico) nel 2011, 2012, 2013, 2014 e 2015 in quanto referente per il tema della reputazione turistica , WHR, Bit, Think Tank Umbria, Think Tank Lugano, Toscanalab, Blob 2.0 Be Wizzard 2014, Like Tourism 2014, BeWizzard 2016.

Ho scritto, in collaborazione con Roberta Milano, il libro : Turismo e Reput'azione, edito dalla Maggioli editore nel 2012.

di cosa parliamo?

- Comprensione del mercato, delle sue dinamiche: quali sono le caratteristiche il viaggiatore del terzo millennio e come il web abbia contribuito a modificare gli equilibri tra domanda e offerta nel settore turistico
- Comprensione dei comportamenti di scelta e di consumo in ambito turistico: le grandi modifiche del travel customer journey è soprattutto legato allo sviluppo delle piattaforme e del mercato elettronico, e alle novità che il web 2.0 ha introdotto nelle fasi primarie del processo di acquisto. I momenti della verità nel sales funnel e l'interazione peer to peer come fonte primaria di conferma della qualità dei prodotto-servizi da selezionare.
- Costruzione del prodotto turistico: innovazione del processo organizzativo e degli strumenti di promozione sono le chiavi di successo per la costruzione di un'offerta turistica in grado di confrontarsi con la competizione internazionale. Elementi di marketing strategico ed operativo
- Sviluppo del marketing territoriale nell'ambito turistico: come costruire la "promessa valoriale del territorio" e i conseguenti strumenti promozionali.

il paradigma comunicativo è mutato: oggi non siamo più solo
“oggetto” di comunicazione ma “soggetto” di questa.
Quello che stiamo costruendo è un equilibrio sociale diverso.
E ne siamo consapevoli solo parzialmente

Giovanni Boccia Artieri, Stati di Connessione, FrancoAngeli 2012

biosfera culturale postmoderna: “an incredible complex labyrinth
of cross-cutting discourses”

G.Simmons: “Marketing to postmodern consumers: introducing the internet chameleon” European Journal of Marketing 2008

evoluzione tecnologica è
influenzata e influenza
nuove abitudini di viaggio

JAN
2016

GLOBAL DIGITAL SNAPSHOT

A SNAPSHOT OF THE WORLD'S KEY DIGITAL STATISTICAL INDICATORS



TOTAL
POPULATION



we
are
social

7.395
BILLION

URBANISATION: 54%

FIGURE REPRESENTS TOTAL GLOBAL
POPULATION, INCLUDING CHILDREN

INTERNET
USERS



we
are
social

3.419
BILLION

PENETRATION: 46%

FIGURE INCLUDES ACCESS VIA
FIXED AND MOBILE CONNECTIONS

ACTIVE SOCIAL
MEDIA USERS



we
are
social

2.307
BILLION

PENETRATION: 31%

FIGURE BASED ON ACTIVE USER
ACCOUNTS, NOT UNIQUE INDIVIDUALS

UNIQUE
MOBILE USERS



we
are
social

3.790
BILLION

PENETRATION: 51%

FIGURE REPRESENTS
UNIQUE MOBILE PHONE USERS

ACTIVE MOBILE
SOCIAL USERS



we
are
social

1.968
BILLION

PENETRATION: 27%

FIGURE BASED ON ACTIVE USER
ACCOUNTS, NOT UNIQUE INDIVIDUALS

**JAN
2016**

ANNUAL GROWTH

YEAR-ON-YEAR GROWTH TRENDS FOR KEY DIGITAL STATISTICAL INDICATORS



GROWTH IN THE
NUMBER OF ACTIVE
INTERNET USERS



we
are
social

+10%

SINCE JAN 2015

+332 MILLION

GROWTH IN THE
NUMBER OF ACTIVE
SOCIAL MEDIA USERS



we
are
social

+10%

SINCE JAN 2015

+219 MILLION

GROWTH IN THE
NUMBER OF UNIQUE
MOBILE USERS



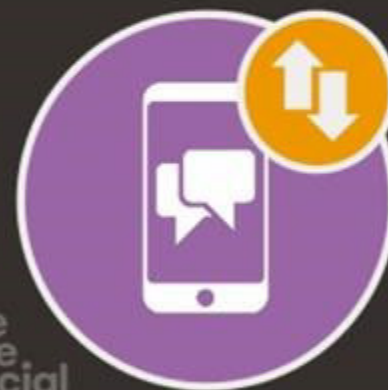
we
are
social

+4%

SINCE JAN 2015

+141 MILLION

GROWTH IN THE
NUMBER OF ACTIVE
MOBILE SOCIAL USERS



+17%

SINCE JAN 2015

+283 MILLION

**JAN
2016**

SHARE OF GLOBAL USERS



**JAN
2016**

DIGITAL IN EUROPE

A SNAPSHOT OF THE REGION'S KEY DIGITAL STATISTICAL INDICATORS

TOTAL
POPULATION



we
are
social

**838
MILLION**

URBANISATION: 73%

FIGURE REPRESENTS TOTAL REGIONAL
POPULATION, INCLUDING CHILDREN

ACTIVE
INTERNET USERS



we
are
social

**616
MILLION**

PENETRATION: 73%

FIGURE INCLUDES ACCESS VIA
FIXED AND MOBILE CONNECTIONS

ACTIVE SOCIAL
MEDIA USERS



we
are
social

**393
MILLION**

PENETRATION: 47%

FIGURE BASED ON ACTIVE USER
ACCOUNTS, NOT UNIQUE INDIVIDUALS

MOBILE
CONNECTIONS



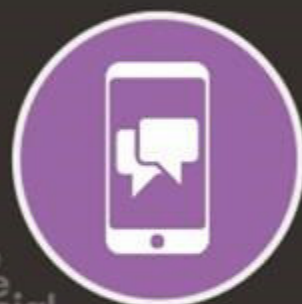
we
are
social

**1,102
MILLION**

vs POPULATION: 132%

FIGURE REPRESENTS MOBILE
SUBSCRIPTIONS, NOT UNIQUE USERS

ACTIVE MOBILE
SOCIAL USERS



we
are
social

**305
MILLION**

PENETRATION: 36%

FIGURE BASED ON ACTIVE USER
ACCOUNTS, NOT UNIQUE INDIVIDUALS

**JAN
2016**

ANNUAL GROWTH: EUROPE

YEAR-ON-YEAR GROWTH TRENDS FOR THE REGION'S KEY DIGITAL STATISTICAL INDICATORS

GROWTH IN THE
NUMBER OF ACTIVE
INTERNET USERS



we
are
social

+4%

SINCE JAN 2015

+25.9 MILLION

GROWTH IN THE
NUMBER OF ACTIVE
SOCIAL MEDIA USERS



we
are
social

+3%

SINCE JAN 2015

+11.2 MILLION

GROWTH IN THE
NUMBER OF MOBILE
CONNECTIONS



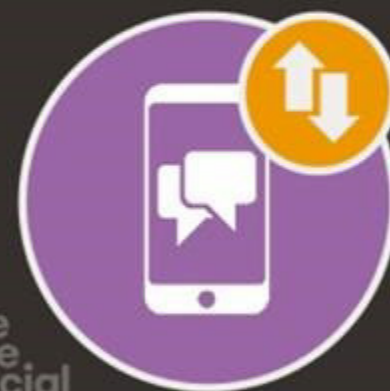
we
are
social

+1%

SINCE JAN 2015

+13.5 MILLION

GROWTH IN THE
NUMBER OF ACTIVE
MOBILE SOCIAL USERS



+6%

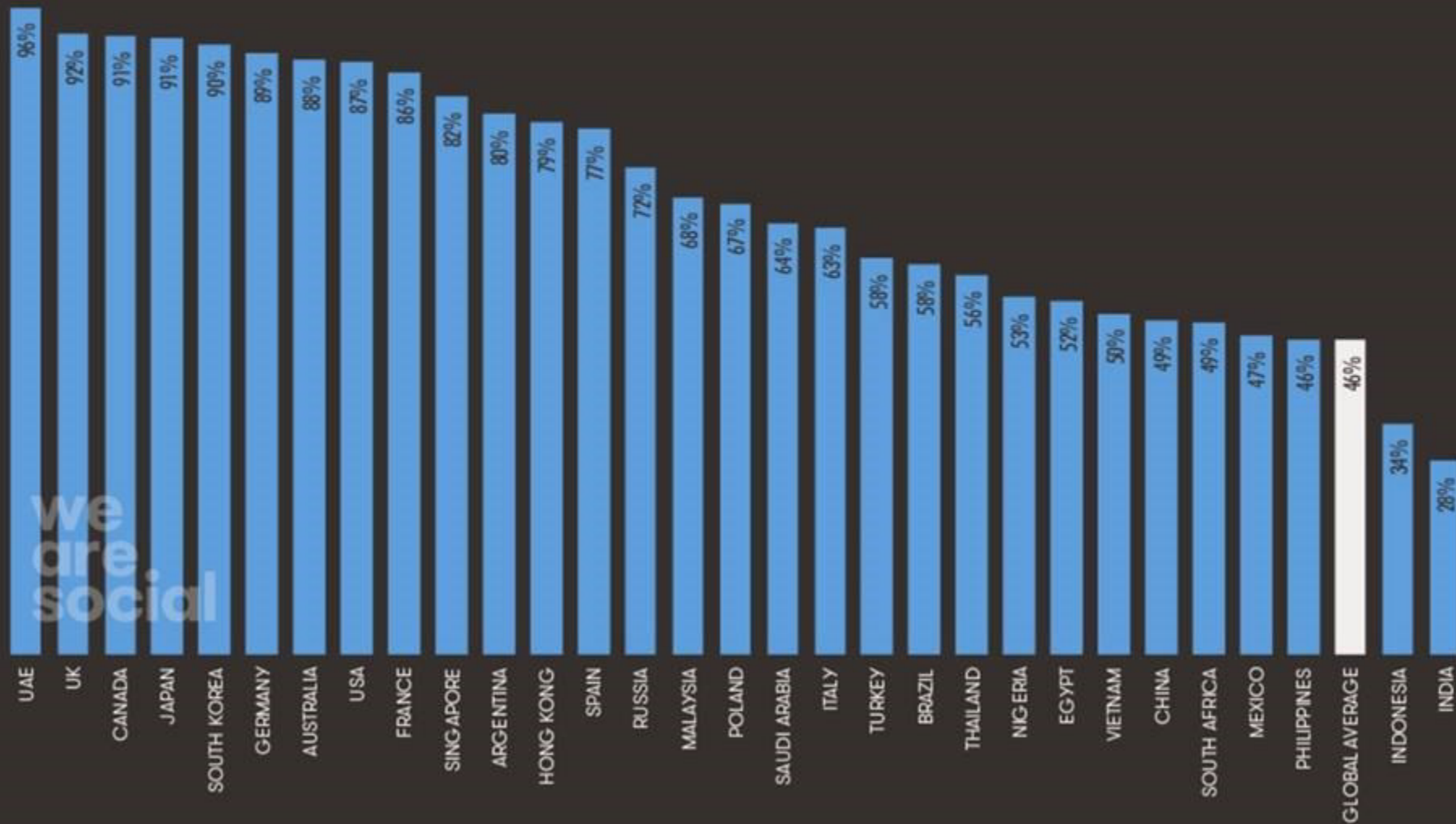
SINCE JAN 2015

+18.2 MILLION

JAN
2016

INTERNET USE BY COUNTRY

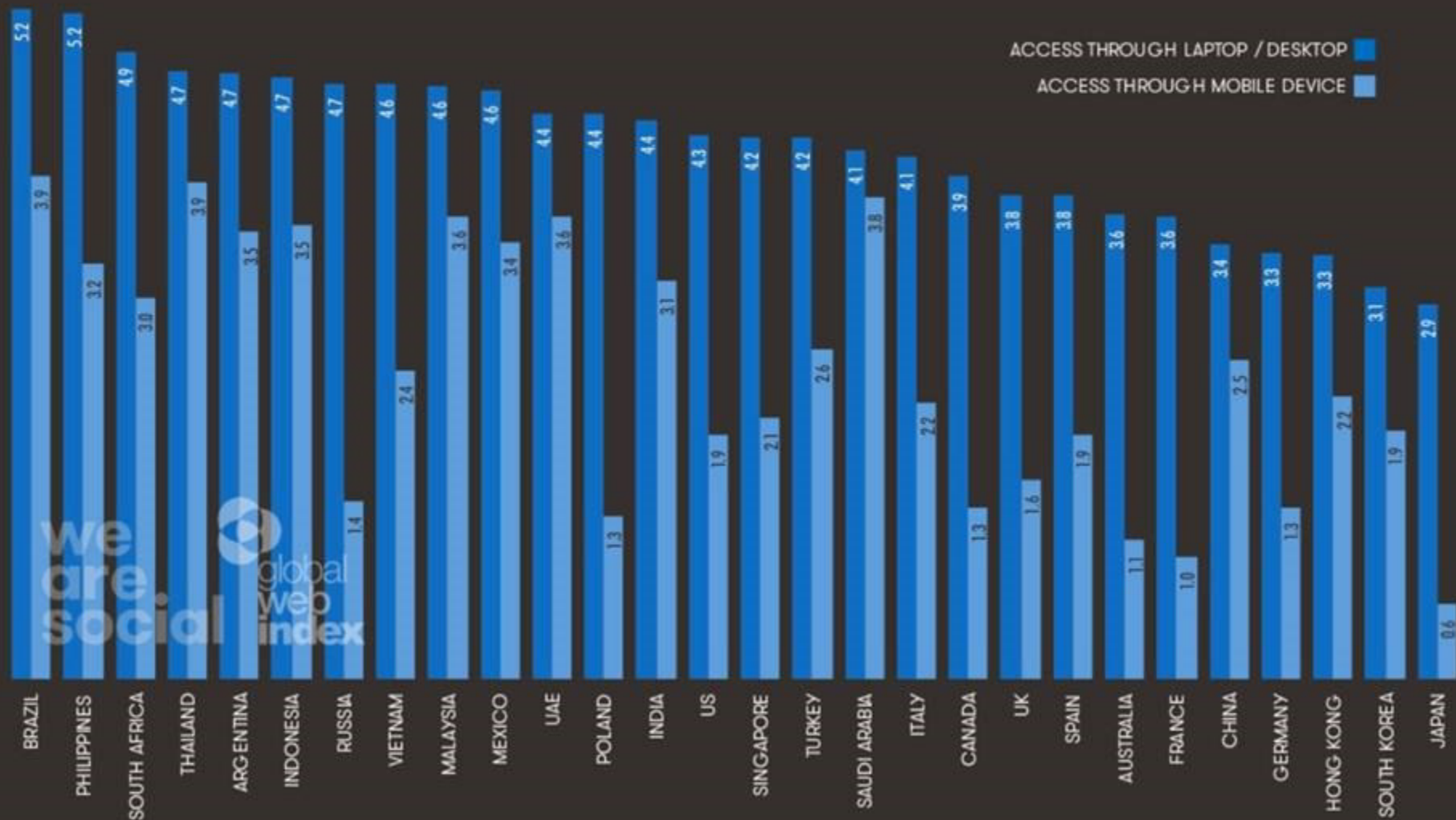
NATIONAL INTERNET PENETRATION FIGURES



**JAN
2016**

TIME SPENT ON THE INTERNET

AVERAGE NUMBER OF HOURS SPENT USING THE INTERNET PER DAY, SPLIT BY PC USE AND MOBILE PHONE USE



**JAN
2016**

SHARE OF WEB TRAFFIC BY DEVICE

BASED ON EACH DEVICE'S SHARE OF TOTAL WEB PAGES SERVED

SHARE OF WEB
PAGE VIEWS:
LAPTOPS & DESKTOPS



56%

YEAR-ON-YEAR:
-9%

SHARE OF WEB
PAGE VIEWS:
MOBILE PHONES



39%

YEAR-ON-YEAR:
+21%

SHARE OF WEB
PAGE VIEWS:
TABLETS



5%

YEAR-ON-YEAR:
-21%

SHARE OF WEB
PAGE VIEWS:
OTHER DEVICES



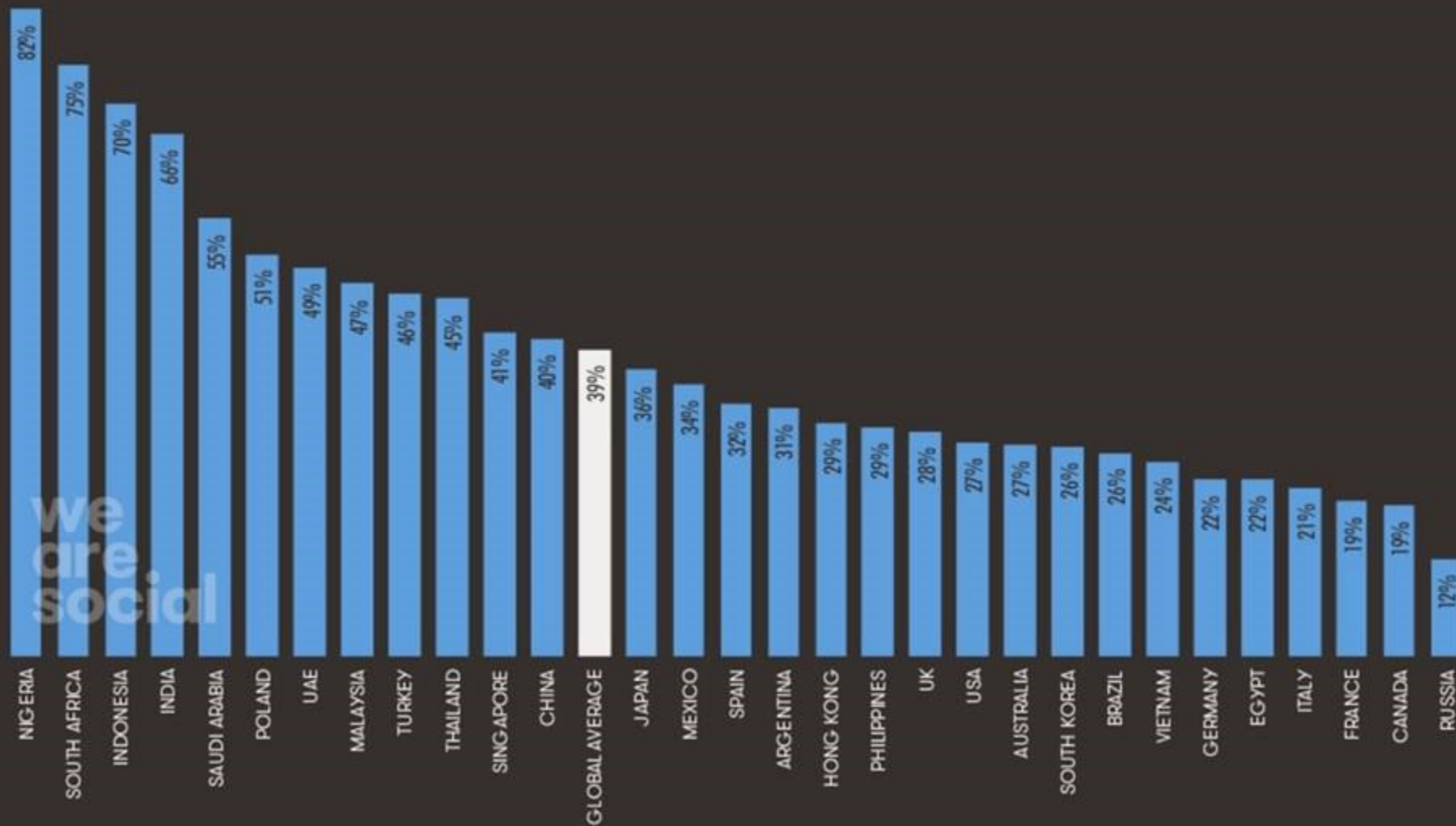
0.1%

YEAR-ON-YEAR:
-10%

JAN
2016

MOBILE'S SHARE OF WEB TRAFFIC

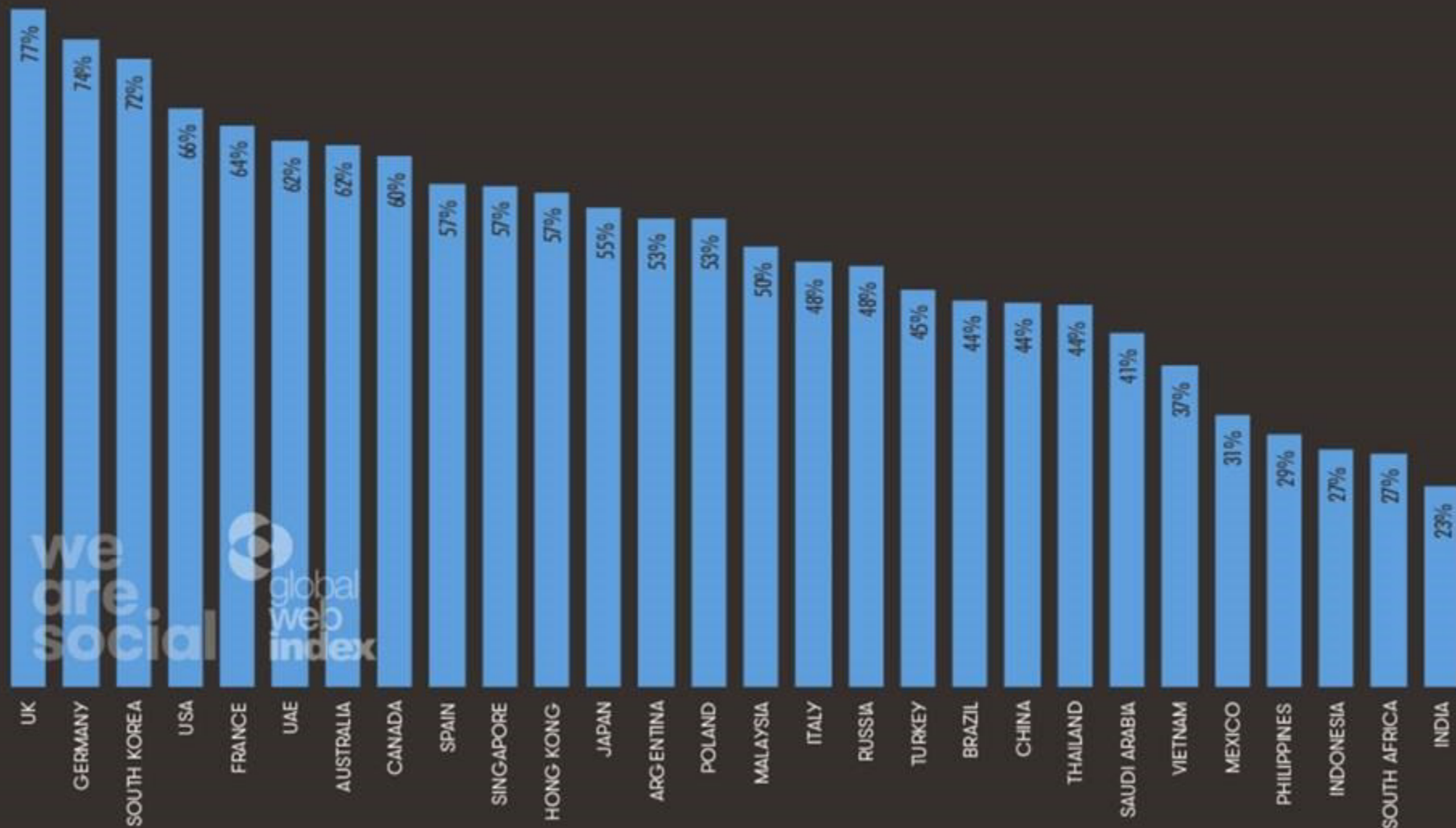
PERCENTAGE OF TOTAL WEB PAGES SERVED TO MOBILE PHONES



JAN
2016

ACTIVE E-COMMERCE SHOPPERS

PERCENTAGE OF THE NATIONAL POPULATION WHO BOUGHT SOMETHING ONLINE IN THE PAST MONTH [SURVEY-BASED]

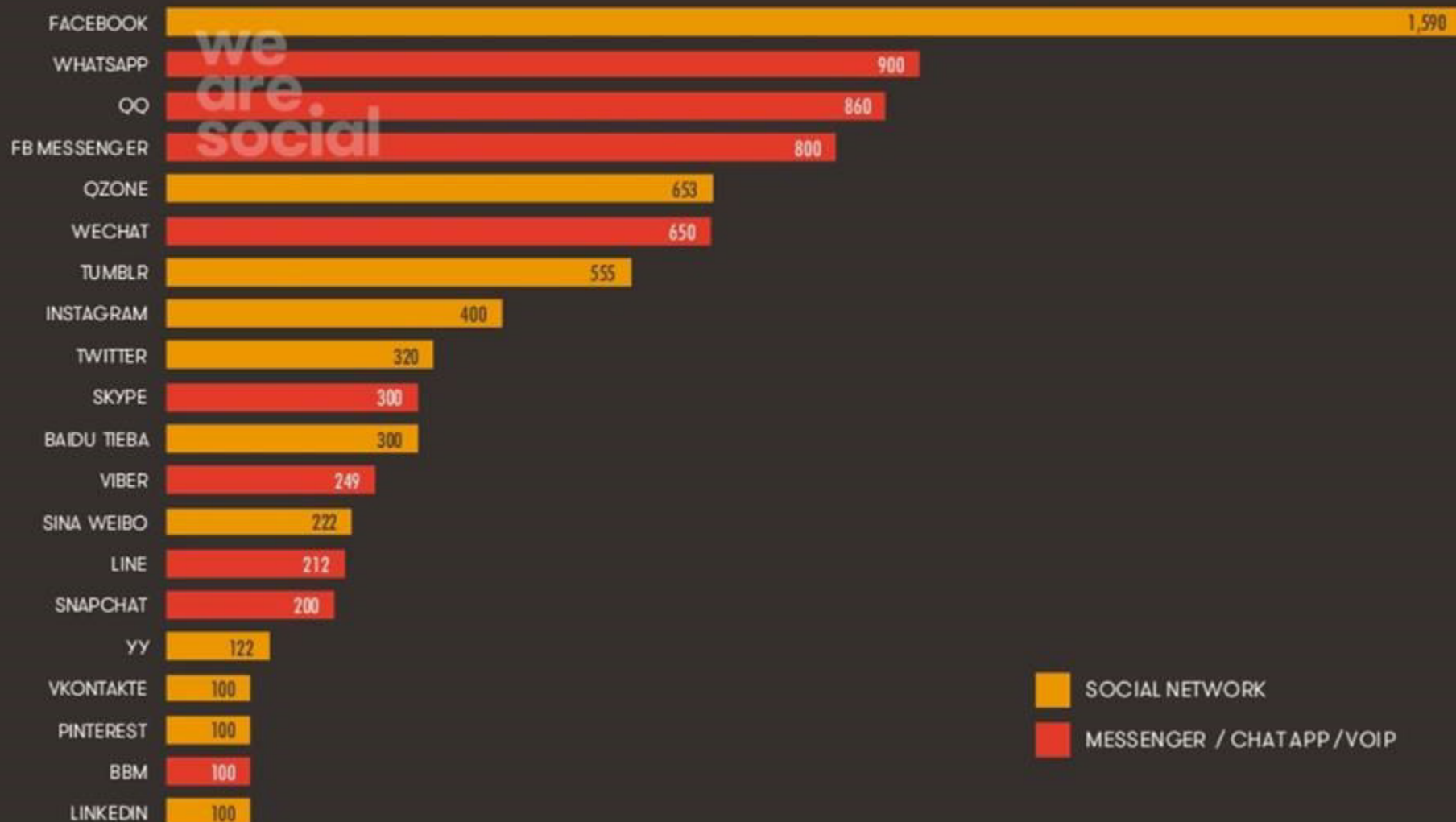


**JAN
2016**

ACTIVE USERS BY SOCIAL PLATFORM

MOST RECENTLY PUBLISHED MONTHLY ACTIVE USER ACCOUNTS BY PLATFORM, IN MILLIONS

UPDATED



**JAN
2016**

FACEBOOK USE BY DEVICE

BASED ON THE GLOBAL NUMBER OF ACTIVE USER ACCOUNTS ACCESSING FACEBOOK VIA EACH DEVICE, IN MILLIONS

ACTIVE ACCOUNTS
ACCESSING VIA DESKTOP
OR LAPTOP COMPUTERS



748M

PERCENTAGE OF TOTAL:
50%

ACTIVE ACCOUNTS
ACCESSING VIA
SMARTPHONES



1,259M

PERCENTAGE OF TOTAL:
83%

ACTIVE ACCOUNTS
ACCESSING VIA
FEATURE PHONES



38M

PERCENTAGE OF TOTAL:
2%

ACTIVE ACCOUNTS
ACCESSING VIA
TABLETS



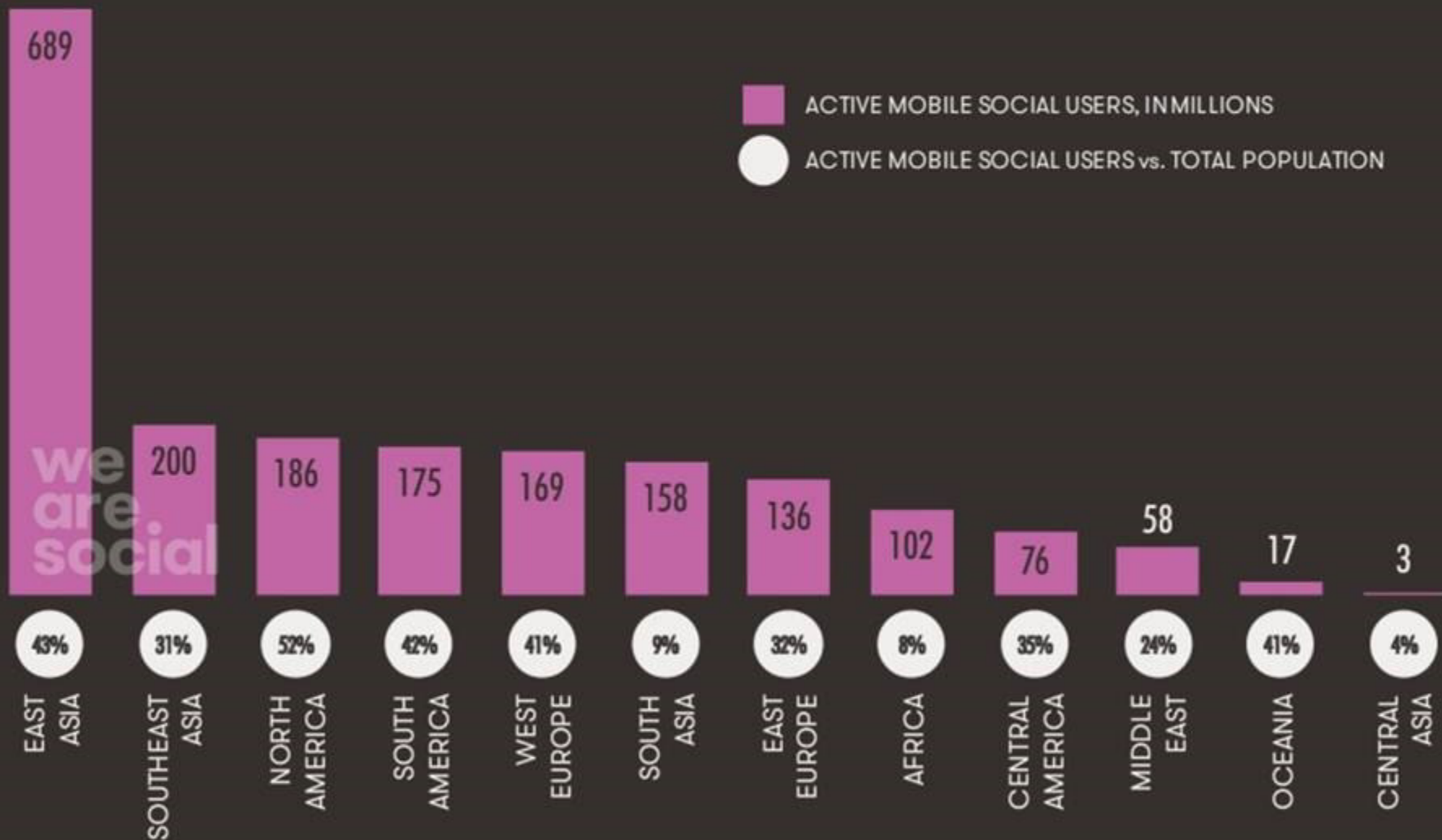
221M

PERCENTAGE OF TOTAL:
15%

JAN
2016

MOBILE SOCIAL REGIONAL OVERVIEW

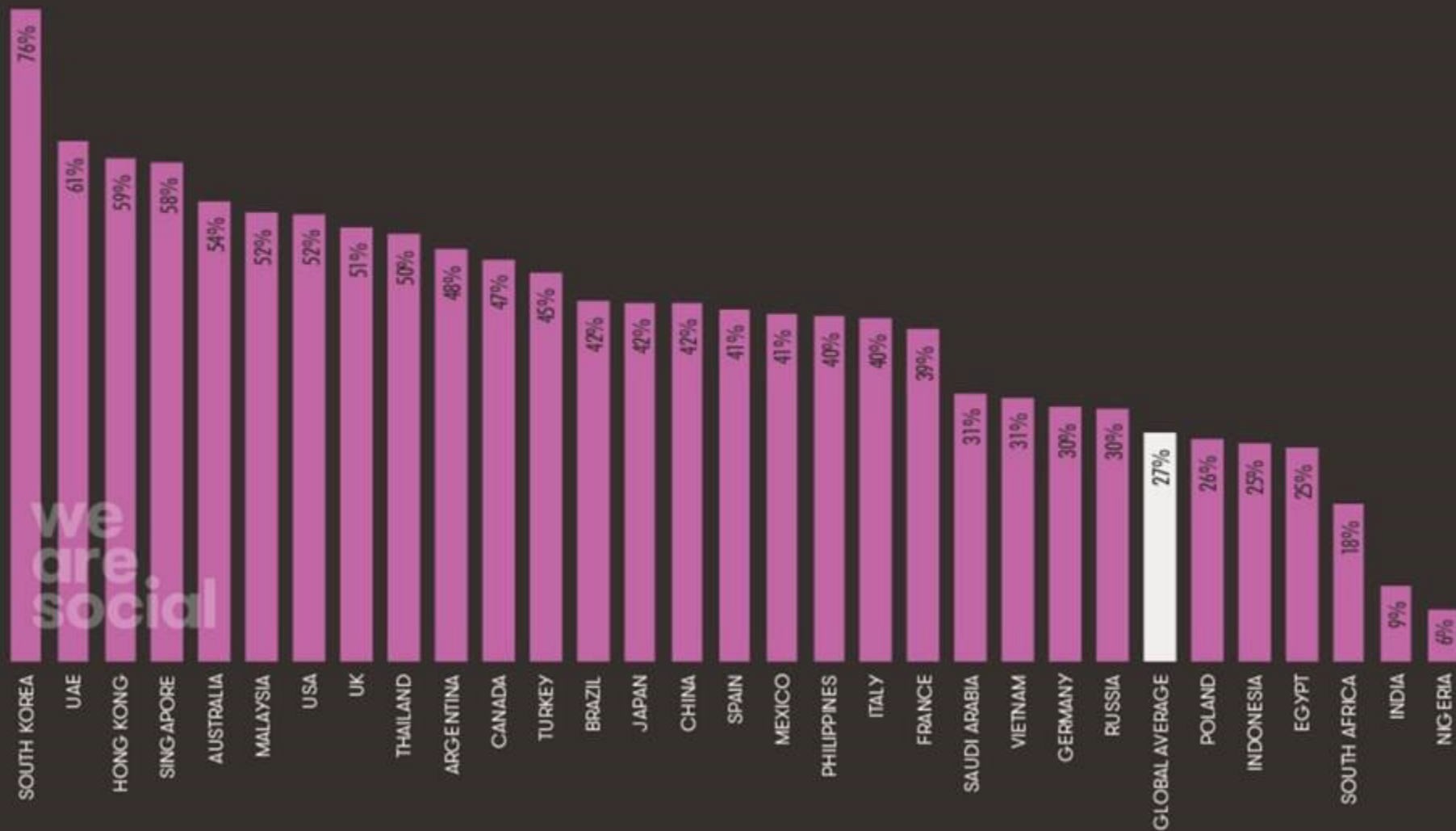
MOBILE-ACTIVE ACCOUNTS ON THE TOP SOCIAL NETWORK IN EACH COUNTRY (IN MILLIONS) COMPARED TO POPULATION



JAN
2016

MOBILE SOCIAL USE BY COUNTRY

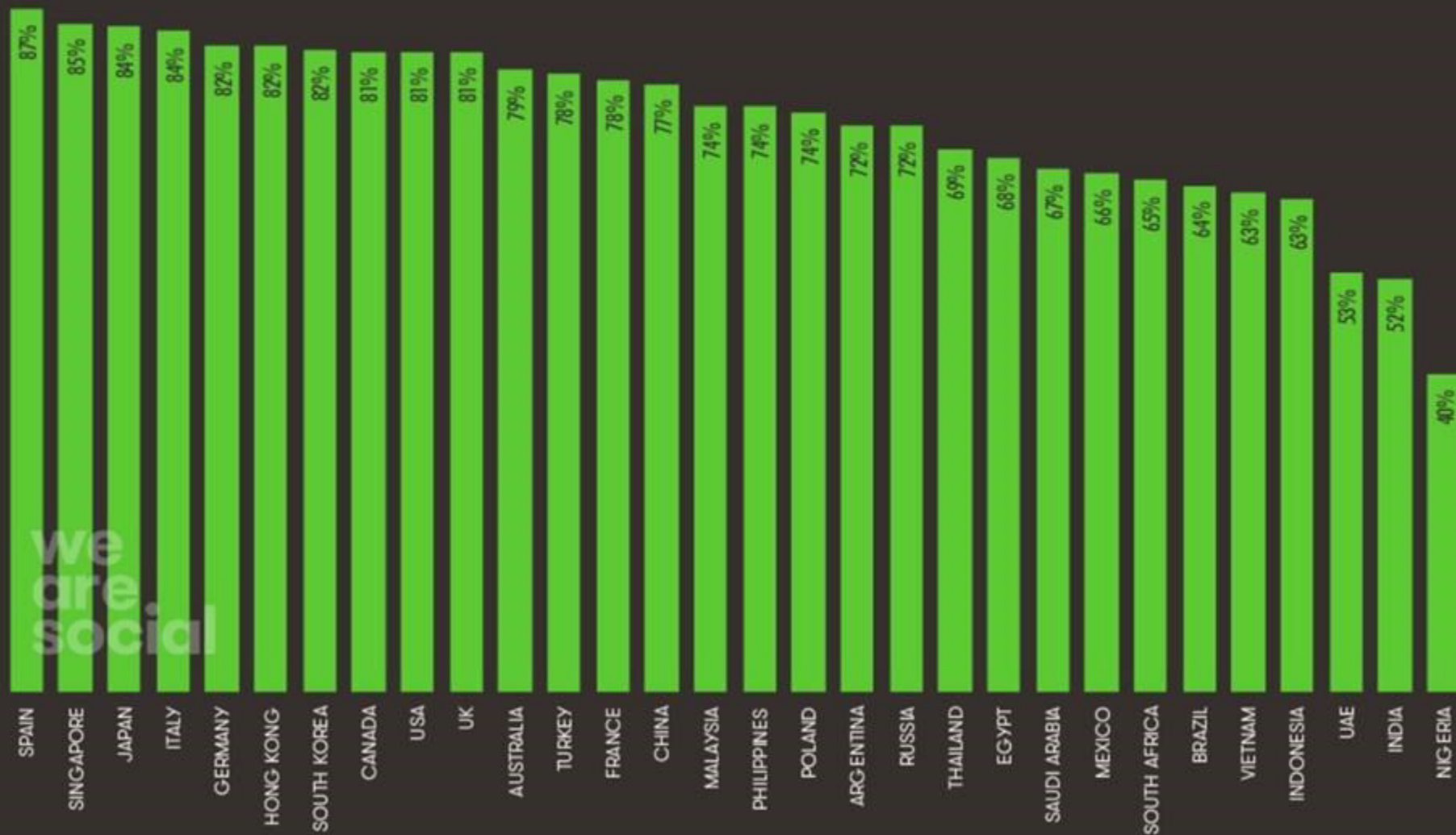
ACTIVE ACCOUNTS ON THE TOP SOCIAL NETWORK IN EACH COUNTRY ACCESSING VIA MOBILE, COMPARED TO POPULATION



JAN
2016

UNIQUE MOBILE USERS BY COUNTRY

MOBILE USERS BY COUNTRY, COMPARED TO NATIONAL POPULATIONS

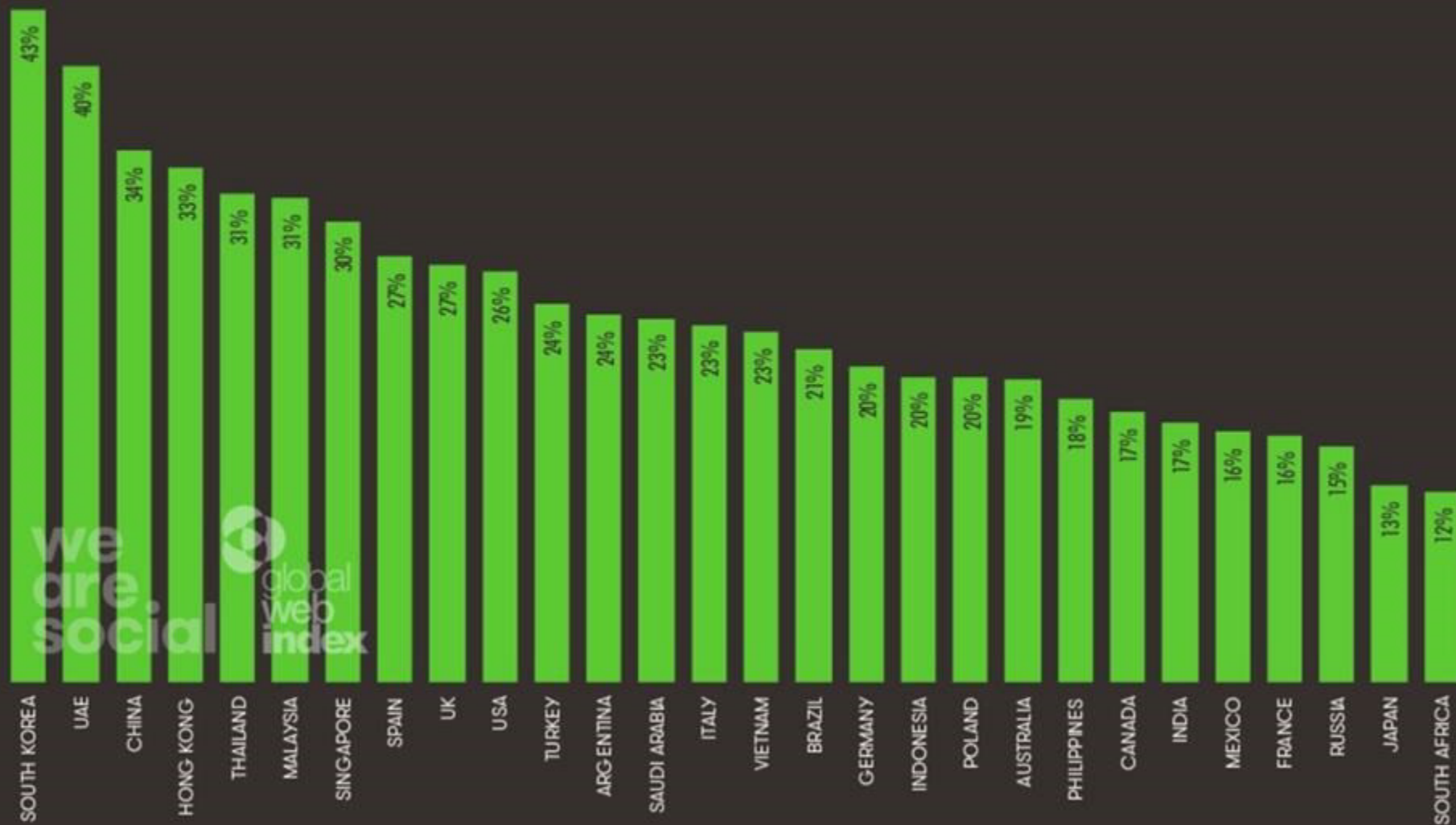


we
are
social

JAN
2016

ACTIVE M-COMMERCE SHOPPERS

PERCENTAGE OF THE POPULATION WHO BOUGHT SOMETHING ONLINE VIA A PHONE IN THE PAST MONTH [SURVEY-BASED]



**JAN
2016**

DIGITAL IN ITALY

A SNAPSHOT OF THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS



TOTAL
POPULATION



we
are
social

**59.80
MILLION**

URBANISATION: 69%

FIGURE REPRESENTS TOTAL NATIONAL
POPULATION, INCLUDING CHILDREN

ACTIVE
INTERNET USERS



we
are
social

**37.67
MILLION**

PENETRATION: 63%

FIGURE INCLUDES ACCESS VIA
FIXED AND MOBILE CONNECTIONS

ACTIVE SOCIAL
MEDIA USERS



we
are
social

**28.00
MILLION**

PENETRATION: 47%

FIGURE BASED ON ACTIVE USER
ACCOUNTS, NOT UNIQUE INDIVIDUALS

MOBILE
CONNECTIONS



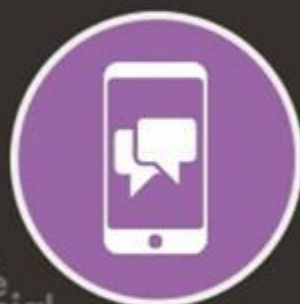
we
are
social

**80.29
MILLION**

vs POPULATION: 134%

FIGURE REPRESENTS MOBILE
SUBSCRIPTIONS, NOT UNIQUE USERS

ACTIVE MOBILE
SOCIAL USERS



we
are
social

**24.00
MILLION**

PENETRATION: 40%

FIGURE BASED ON ACTIVE USER
ACCOUNTS, NOT UNIQUE INDIVIDUALS

**JAN
2016**

ANNUAL GROWTH

GROWTH TRENDS FOR THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS



GROWTH IN THE
NUMBER OF ACTIVE
INTERNET USERS



we
are
social

+6%

SINCE JAN 2015

GROWTH IN THE
NUMBER OF ACTIVE
SOCIAL MEDIA USERS



we
are
social

0%

SINCE JAN 2015

GROWTH IN THE
NUMBER OF MOBILE
SUBSCRIPTIONS

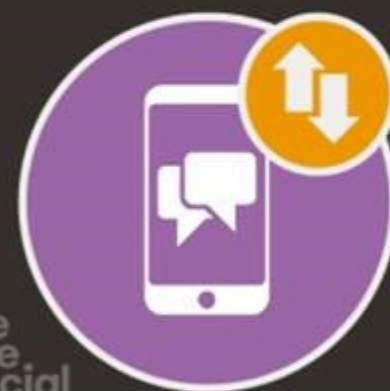


we
are
social

-2%

SINCE JAN 2015

GROWTH IN THE NUMBER
OF ACTIVE MOBILE
SOCIAL USERS



+9%

SINCE JAN 2015

**JAN
2016**

DIGITAL DEVICE OWNERSHIP

PERCENTAGE OF THE ADULT POPULATION* THAT OWNS EACH KIND OF DEVICE



MOBILE PHONE
(ALL TYPES)



we
are
social

95%

SMART
PHONE



Google

62%

LAPTOP OR
DESKTOP COMPUTER



we
are
social

65%

TABLET
DEVICE



21%

TV STREAMING
DEVICE



Google

6%

HANDHELD
GAMING CONSOLE



we
are
social

[N/A]

E-READER
DEVICE



Google

3%

WEARABLE
TECH DEVICE



1%

**JAN
2016**

TIME SPENT WITH MEDIA

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



AVERAGE DAILY USE
OF THE INTERNET
VIA A PC OR TABLET



4H 05M

AVERAGE DAILY USE
OF THE INTERNET
VIA A MOBILE PHONE



2H 10M

AVERAGE DAILY USE
OF SOCIAL MEDIA
VIA ANY DEVICE



1H 57M

AVERAGE DAILY
TELEVISION
VIEWING TIME



2H 25M

global
web
index

**JAN
2016**

INTERNET USE

BASED ON REPORTED ACTIVE INTERNET USER DATA, AND USER-CLAIMED MOBILE INTERNET USE



TOTAL NUMBER
OF ACTIVE
INTERNET USERS



we
are
social

37.7M

INTERNET USERS AS A
PERCENTAGE OF THE
TOTAL POPULATION



we
are
social

63%

TOTAL NUMBER
OF ACTIVE MOBILE
INTERNET USERS



global
web
index

28.5M

MOBILE INTERNET USERS AS
A PERCENTAGE OF THE
TOTAL POPULATION



48%

JAN
2016

INTERNET USERS: PERSPECTIVE

ESTIMATES OF THE TOTAL NUMBER OF INTERNET USERS FROM DIFFERENT DATA PROVIDERS



INTERNET USERS:
INTERNETWORLDSTATS DATA



we
are
social

37.67M

INTERNET USERS:
ITU DATA



we
are
social

37.05M

INTERNET USERS:
CIA DATA



37.00M

**JAN
2016**

FREQUENCY OF INTERNET USE

HOW OFTEN INTERNET USERS ACCESS THE INTERNET FOR PERSONAL REASONS (ANY DEVICE)



USE THE
INTERNET
EVERY DAY



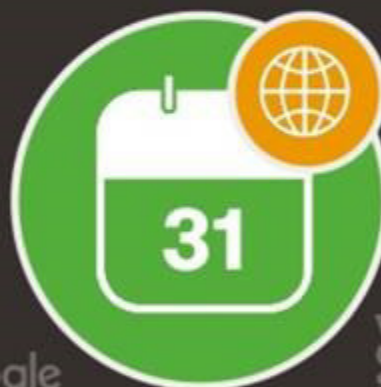
79%

USE THE INTERNET
AT LEAST ONCE
PER WEEK



15%

USE THE INTERNET
AT LEAST ONCE
PER MONTH



5%

USE THE INTERNET
LESS THAN ONCE
PER MONTH



1%

we
are
social

Google

we
are
social

**JAN
2016**

SHARE OF WEB TRAFFIC

BASED ON EACH DEVICE'S SHARE OF THE TOTAL WEB PAGES SERVED TO WEB BROWSERS



SHARE OF WEB
PAGE VIEWS:
LAPTOPS & DESKTOPS



we
are
social

73%

YEAR-ON-YEAR:
+18%

SHARE OF WEB
PAGE VIEWS:
MOBILE PHONES



Stat
Counter

21%

YEAR-ON-YEAR:
-29%

SHARE OF WEB
PAGE VIEWS:
TABLETS



we
are
social

6%

YEAR-ON-YEAR:
-33%

SHARE OF WEB
PAGE VIEWS:
OTHER DEVICES



0.17%

YEAR-ON-YEAR:
0%

JAN
2016

TOP ACTIVE SOCIAL PLATFORMS

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



FACEBOOK

33%

WHATSAPP

30%

FACEBOOK
MESSENGER

23%

GOOGLE+

14%

TWITTER

12%

INSTAGRAM

12%

SKYPE

12%

LINKEDIN

9%

PINTEREST

6%

VIBER

6%



SOCIAL NETWORK



MESSENGER / CHAT APP / VOIP

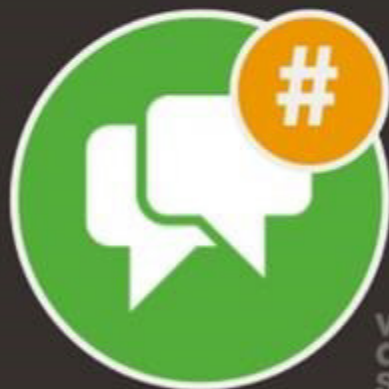
**JAN
2016**

SOCIAL MEDIA USE

BASED ON MONTHLY ACTIVE USER NUMBERS REPORTED BY THE COUNTRY'S MOST ACTIVE PLATFORM



TOTAL NUMBER
OF ACTIVE SOCIAL
MEDIA USERS



we
are
social

28.0M

ACTIVE SOCIAL USERS
AS A PERCENTAGE OF
THE TOTAL POPULATION



we
are
social

47%

TOTAL NUMBER
OF SOCIAL USERS
ACCESSING VIA MOBILE



we
are
social

24.0M

ACTIVE MOBILE SOCIAL
USERS AS A PERCENTAGE
OF THE TOTAL POPULATION



40%

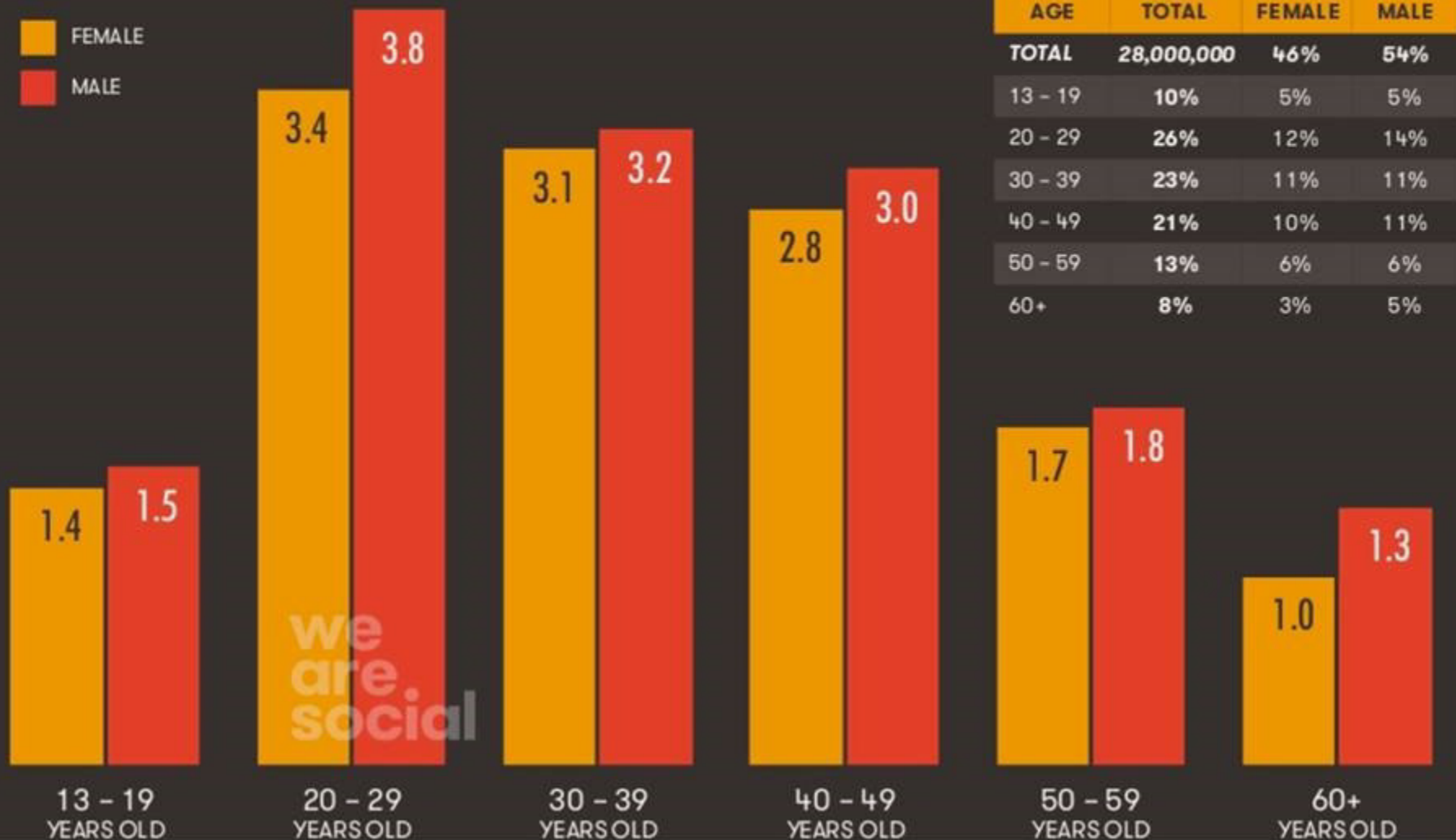
JAN
2016

FACEBOOK USER PROFILE

DETAIL OF FACEBOOK USERS BY AGE GROUP AND GENDER, IN MILLIONS



FEMALE
MALE



**JAN
2016**

MOBILE USERS & CONNECTIONS

COMPARING THE NUMBER OF UNIQUE MOBILE USERS TO THE NUMBER OF MOBILE CONNECTIONS



NUMBER OF UNIQUE
MOBILE USERS (ANY
TYPE OF HANDSET)



we
are
social

50.2M

MOBILE PENETRATION
(UNIQUE USERS
vs. POPULATION)



we
are
social

84%

NUMBER OF MOBILE
CONNECTIONS
(SUBSCRIPTIONS)



we
are
social

80.3M

MOBILE CONNECTIONS
AS A PERCENTAGE OF
TOTAL POPULATION



we
are
social

134%

AVERAGE NUMBER OF
CONNECTIONS PER
UNIQUE MOBILE USER



1.60

**JAN
2016**

MOBILE CONNECTIONS

BASED ON THE NUMBER OF CELLULAR SUBSCRIPTIONS / CONNECTIONS (NOT UNIQUE USERS)



TOTAL NUMBER
OF MOBILE
SUBSCRIPTIONS



80.3M

MOBILE SUBSCRIPTIONS
AS A PERCENTAGE OF
THE TOTAL POPULATION



134%

PERCENTAGE OF
MOBILE CONNECTIONS
THAT ARE PRE-PAID



84%

PERCENTAGE OF
MOBILE CONNECTIONS
THAT ARE POST-PAID



16%

PERCENTAGE OF MOBILE
CONNECTIONS THAT ARE
BROADBAND (3G & 4G)



75%

**JAN
2016**

MOBILE ACTIVITIES

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



PERCENTAGE OF THE
POPULATION USING
MOBILE MESSENGERS



we
are
social

43%

PERCENTAGE OF THE
POPULATION WATCHING
VIDEOS ON MOBILE



global
web
index

30%

PERCENTAGE OF THE
POPULATION PLAYING
GAMES ON MOBILE



we
are
social

24%

PERCENTAGE
OF THE POPULATION
USING MOBILE BANKING



global
web
index

21%

PERCENTAGE OF THE
POPULATION USING
MOBILE MAP SERVICES



34%

**JAN
2016**

E-COMMERCE BY DEVICE

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY



PURCHASED A
PRODUCT OR
SERVICE ONLINE
IN THE PAST 30 DAYS



we
are
social

48%

SEARCHED ONLINE
FOR A PRODUCT
OR SERVICE TO BUY
IN THE PAST 30 DAYS



global
web
index

56%

VISITED AN
ONLINE RETAIL
STORE IN THE
PAST 30 DAYS



we
are
social

53%

MADE AN ONLINE
PURCHASE VIA A LAPTOP
OR DESKTOP COMPUTER
IN THE PAST 30 DAYS



global
web
index

44%

MADE AN ONLINE
PURCHASE VIA A
MOBILE DEVICE IN
THE PAST 30 DAYS



23%

evoluzione di internet 2016

Il numero di **utenti internet totali è cresciuto del +10%** così come quello degli utenti attivi sui canali social; il numero di persone che utilizza **dispositivi mobile è incrementato del +4%** e superano il +17% gli utenti che accedono ai social media tramite mobile mentre è diminuita la fruizione da tablet (-16%). Oggi, quindi, le persone che hanno possibilità di accedere ad internet sono circa **3,4 miliardi**, con una penetrazione, sul totale della popolazione mondiale, del 46% (contro il 42% del 2015); gli **utenti attivi sui social network**, invece, sono circa **2,3 miliardi**.

E quale sarà il social media più utilizzato?

Senza dubbio e con un ampio stacco, ancora una volta, troviamo al primo posto **Facebook** con **oltre 1.5 miliardi di utenti attivi**, anche se è in forte crescita l'uso di servizi di **instant messaging**, come Whatsapp (con quasi 1 miliardo di utenti attivi), Facebook Messenger (con oltre 800 milioni) e Snapchat che da 100 è passato a 200 milioni, raddoppiando la sua base di utenza.

Ed in Italia cosa succede?

Gli utenti attivi su internet sono circa **37,6 milioni**, con una penetrazione sulla **popolazione nazionale pari al 63%** mentre sui social network sono circa 28 milioni.

Anche nel nostro Paese si conferma la tendenza delle persone ad **accedere ad internet attraverso il proprio smartphone**: gli utenti infatti sono aumentati di ben il **5%**, attestandosi intorno ai **24 milioni**; e il 79% vi accede quotidianamente.

Inoltre, secondo la ricerca, il 95% degli italiani possiede un cellulare, il 62% uno smartphone, il 65% un computer e il 21% un tablet.

E per concludere, anche in Italia, Facebook è la piattaforma social più usata, seguita da Whatsapp e Facebook Messenger, per la gioia di Mark Zuckerberg.

In crescita anche **Instagram** che raddoppia la propria penetrazione nel mercato, passando dal 6 al 12%.

il 2020 secondo Booking

2017

3.2 mil di persone connesse

17 miliardi di oggetti connessi

40% di ricerche vocali

2020

7,6 miliardi di persone connesse

52 miliardi di oggetti connessi

200 milioni di ricerche vocali ogni mese

INTERNET TRENDS 2016 – CODE CONFERENCE

Mary Meeker
June 1, 2016

kpcb.com/InternetTrends



Consumer Preference / Value Evolution by Generation, USA...

Millennials = More Global / Optimistic / Tolerant..., per Acosta



	Silent	Baby Boomers	Gen X	Millennials
Birth Years	1928 – 1945	1946 – 1964	1965 – 1980	1981 – 1996
Year Most of Generation 18-33 Years Old	1963	1980	1998	2014
Summary	<ul style="list-style-type: none"> Grew up during Great Depression Fought 2nd "war to end all wars" Went to college on G.I. Bill Raised "nuclear" families in time of great prosperity + Cold War 	<ul style="list-style-type: none"> Grew up during time of idealism with TV + car for every suburban home Apollo, Civil Rights, Women's Liberation Disillusionment set in with assassination of JFK, Vietnam War, Watergate + increase in divorce rates 	<ul style="list-style-type: none"> Grew up during time of change politically, socially + economically Experienced end of the Cold War, Reaganomics, shift from manufacturing to services economy, + AIDS epidemic Rise of cable TV + PCs 	<ul style="list-style-type: none"> Grew up during digital era with internet, mobile computing, social media + streaming media on iPhones Experiencing time of rising globalization, diversity in race + lifestyle, 9/11, war on terror, mass murder in schools + the Great Recession
Core Values	<ul style="list-style-type: none"> Discipline Dedication Family focus Patriotism 	<ul style="list-style-type: none"> Anything is possible Equal opportunity Question authority Personal gratification 	<ul style="list-style-type: none"> Independent Pragmatic Entrepreneurial Self reliance 	<ul style="list-style-type: none"> Globally minded Optimistic Tolerant
Work / Life Balance	<ul style="list-style-type: none"> Work hard for job security 	<ul style="list-style-type: none"> Climb corporate ladder Family time not first on list 	<ul style="list-style-type: none"> Work / life balance important Don't want to repeat Boomer parents' workaholic lifestyles 	<ul style="list-style-type: none"> Expanded view on work / life balance including time for community service + self-development
Technology	<ul style="list-style-type: none"> Have assimilated in order to keep in touch and stay informed 	<ul style="list-style-type: none"> Use technology as needed for work + increasingly to stay in touch through social media such as Facebook 	<ul style="list-style-type: none"> Technology assimilated seamlessly into day-to-day life 	<ul style="list-style-type: none"> Technology is integral Early adopters who move technology forward
Financial Approach	<ul style="list-style-type: none"> Save, save, save 	<ul style="list-style-type: none"> Buy now, pay later 	<ul style="list-style-type: none"> Cautious, conservative 	<ul style="list-style-type: none"> Earn to spend

Evolution of Commerce Over Past ~2 Centuries, USA = Stores → More Stores → Malls → E-Commerce

Corner / General Stores
1800s



Supermarkets
1930s



Discount Chains
1950-60s



Wholesale Clubs
1970-80s



Illustrative Generational Overlap

Silent Generation

Baby Boomers

Generation X

Millennials

Department Stores
Mid-1800s



Shopping Malls
1950s



Superstores
1960-80s

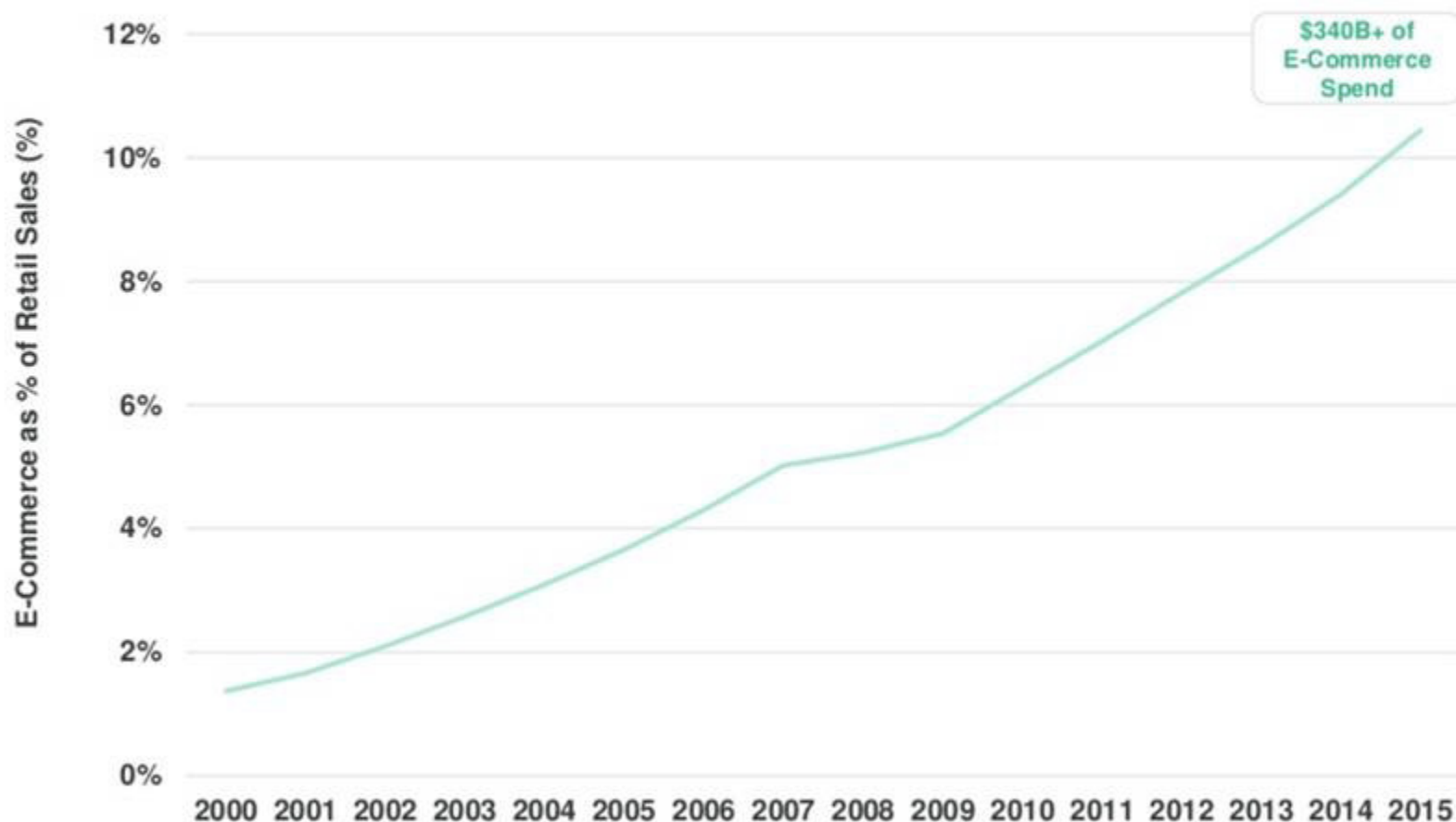


E-Commerce
1990s



Internet Continues to Ramp as Retail Distribution Channel = 10% of Retail Sales vs. <2% in 2000

E-Commerce as % of Total Retail Sales, USA, 2000 – 2015



Generation Z (Ages 1-20) = Communicates with Images

Attributes – Millennials vs. Gen Z

Millennials

Tech Savvy: 2 screens at once

Communicate with text

Curators and Sharers

Now-focused

Optimists

Want to be discovered

vs

Gen Z

Tech Innate: 5 screens at once

Communicate with images

Creators and Collaborators

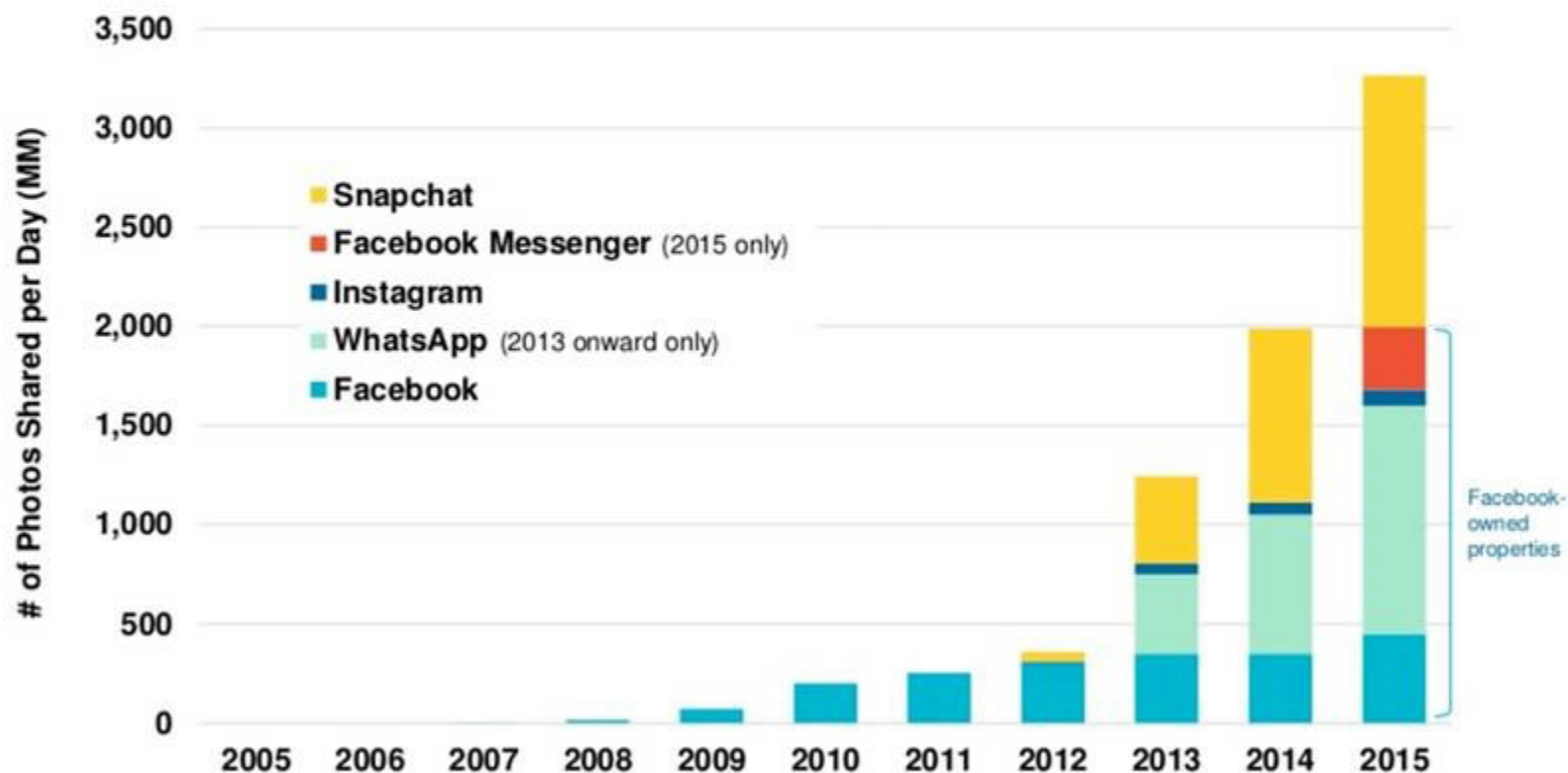
Future-focused

Realists

Want to work for success

Image Growth Remains Strong

Daily Number of Photos Shared on Select Platforms, Global, 2005 – 2015



Messaging =

*Evolving from
Simple Social Conversations to
**More Expressive
Communication...***

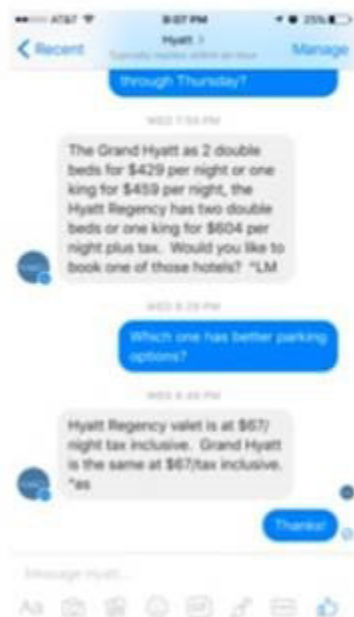
...Messaging =

*Evolving from
Simple Social Conversations to
Business-Related Conversations*

Messaging Secret Sauce = Magic of the Thread = Conversational... Remembers Identity / Time / Specifics / Preferences / Context

Hyatt

Check Availability / Reservations / Order Room Service

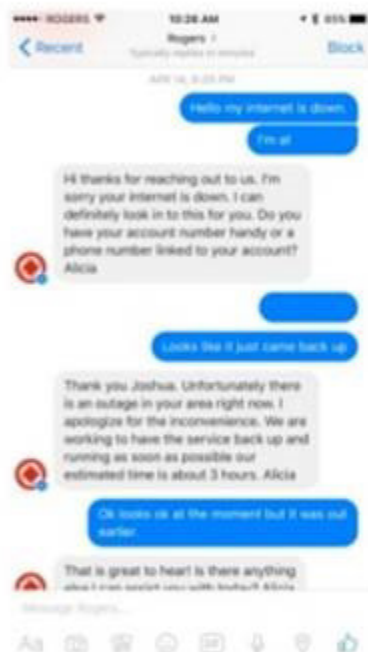


Started Offering Customer Service on Facebook Messenger in 11/15

+20x Increase in Messages Received by Hyatt Within ~1 Month

Rogers Communications

Ask Questions / Update Account / Set Up New Plan



Started Offering Customer Service on Facebook Messenger in 12/15

*65% Increase in Customer Satisfaction
65% Decrease in Customer Complaints*

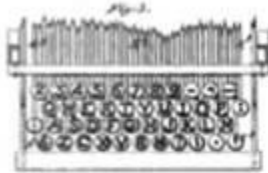
RE-IMAGINING HUMAN / COMPUTER INTERFACES – – VOICE – TRANSPORTATION

***Re-Imagining Voice =
A New Paradigm in
Human-Computer Interaction***

Human-Computer Interaction (1830s – 2015), USA = Touch 1.0 → Touch 2.0 → Touch 3.0 → Voice



Punch Cards for
Informatics
1832



QWERTY
Keyboard
1872



Electromechanical
Computer (Z3)
1941



Electronic Computer
(ENIAC)
1943



Paper Tape Reader
(Harvard Mark I)
1944



Mainframe Computers
(IBM SSEC)
1948



Trackball
1952



Joystick
1967



Microcomputers
(IBM Mark-8)
1974



Portable Computer
(IBM 5100)
1975



Commercial Use of
Window-Based GUI
(Xerox Star)
1981



Commercial Use
of Mouse
(Apple Lisa)
1983



Commercial Use
of Mobile
Computing
(PalmPilot)
1996



Touch + Camera -
based Mobile
Computing
(iPhone 2G)
2007



Voice on Mobile
(Siri)
2011



Voice on Connected /
Ambient Devices
(Amazon Echo)
2014

Voice = Should Be Most Efficient Form of Computing Input

Voice Interfaces – Consumer Benefits

1) Fast

Humans can speak 150 vs. type 40 words per minute, on average...

2) Easy

Convenient, hands-free, instant...

3) Personalized + Context-Driven / Keyboard Free

Ability to understand wide context of questions based on prior questions / interactions / location / other semantics

Voice Interfaces – Unique Qualities

1) Random Access vs. Hierarchical GUI

Think Google Search vs. Yahoo! Directory...

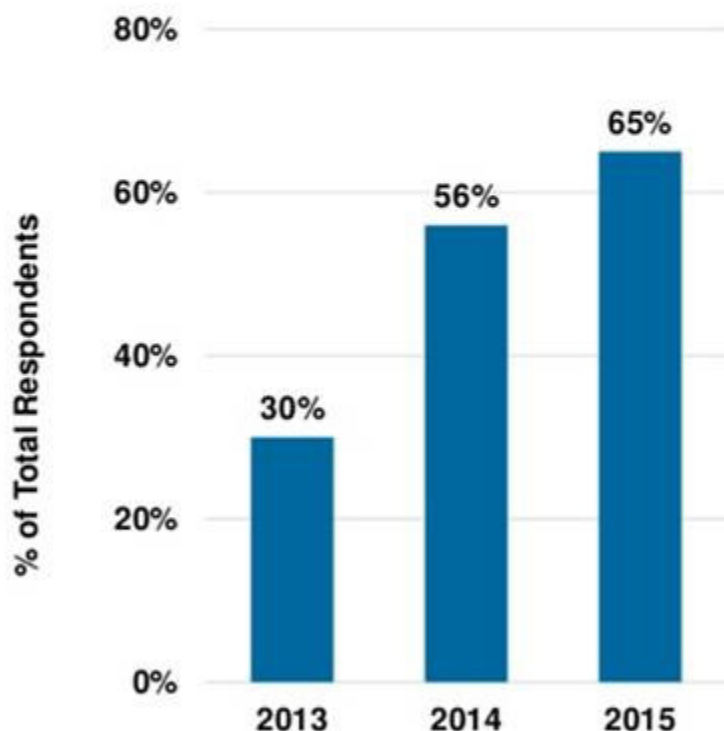
2) Low Cost + Small Footprint

Requires microphone / speaker / processor / connectivity – great for Internet of Things...

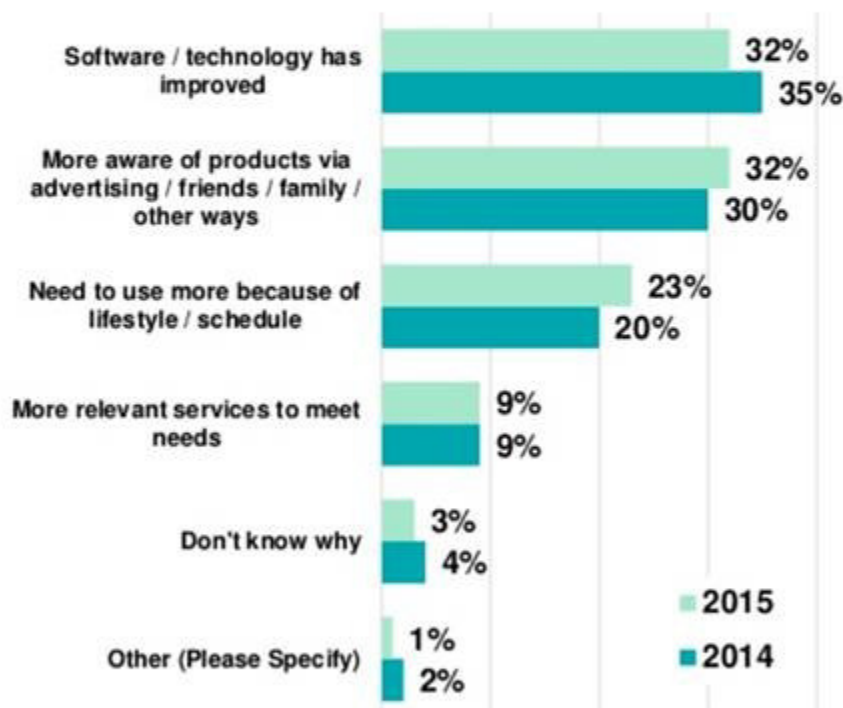
3) Requires Natural Language Recognition & Processing

Mobile Voice Assistant Usage = Rising Quickly... Primarily Driven By Technology Improvements

**% of Smartphone Owners Using Voice Assistants
Annually, USA, 2013 – 2015**



**Voice Assistant Usage – Primary Reason for
Change, % of Respondents, USA, 2014 – 2015**



Voice = Gaining Search Share...

USA Android @ 20%...Baidu @ 10%...Bing Taskbar @ 25%

September 2014

Baidu – 1 in 10 queries come through speech.

May 2016

Bing – 25% of searches performed on Windows 10 taskbar are voice searches per Microsoft reps.

2020

In five years time at least 50% of all searches are going to be either through images or speech.

Andrew Ng
Chief Scientist, Baidu (9/14)

June 2015

Siri – handles more than 1 billion requests per week through speech.

2015

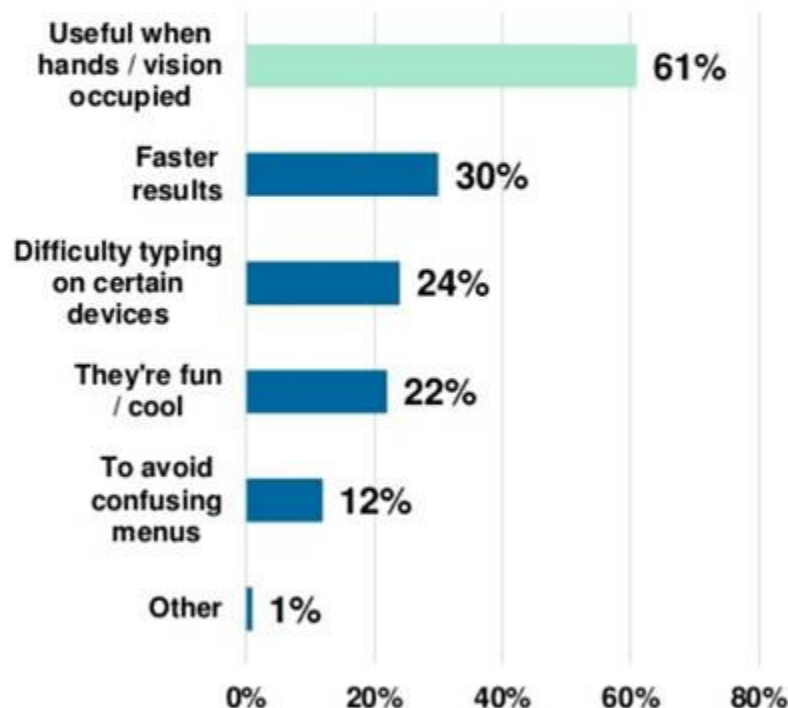
Amazon Echo – fastest-selling speaker in 2015, @ for ~25% of USA speaker market, per 1010data.

May 2016

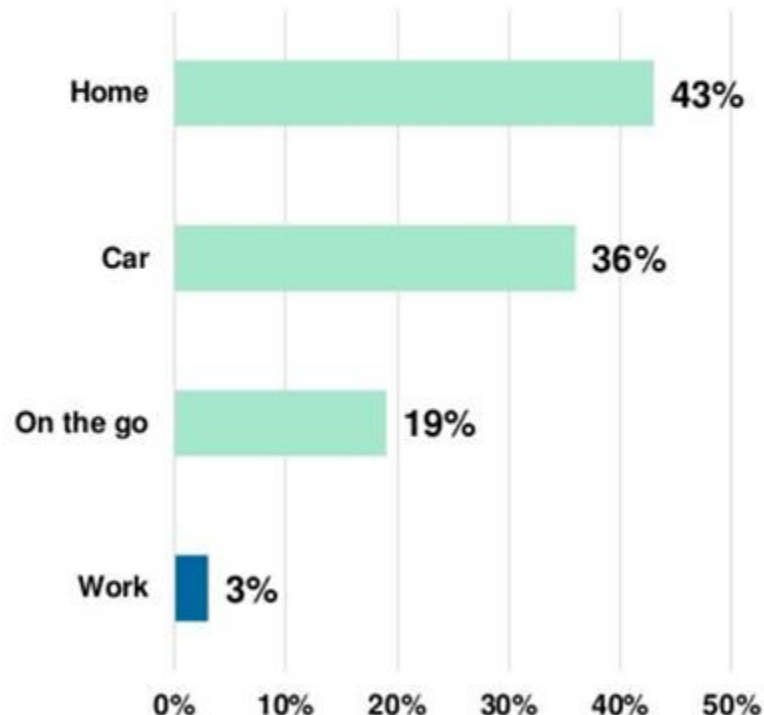
Android – 1 in 5 searches on mobile app in USA are voice searches & share is growing.

Hands & Vision-Free Interaction = Top Reason to Use Voice...@ Home / In Car / On Go

**Primary Reasons for Using Voice,
USA, 2016¹**



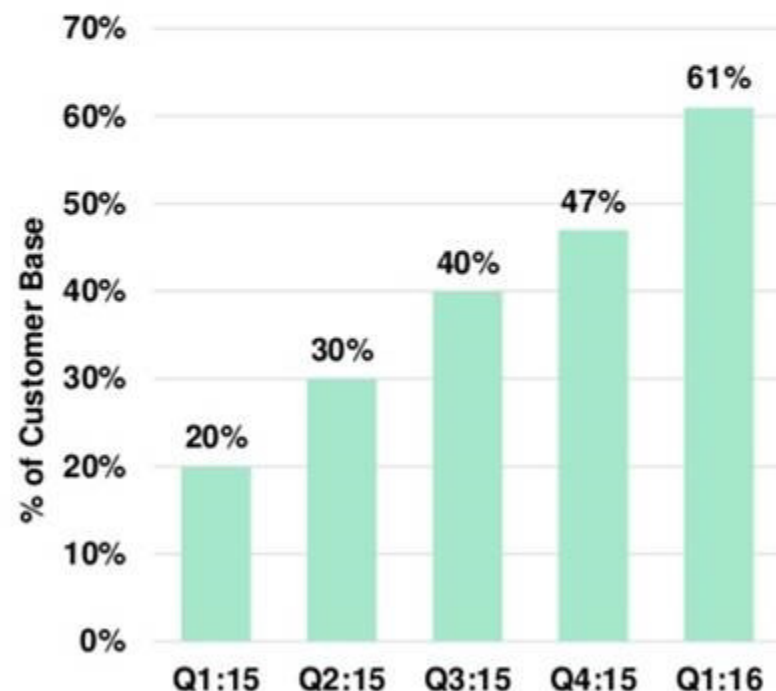
**Primary Setting for Voice Usage,
USA, 2016²**



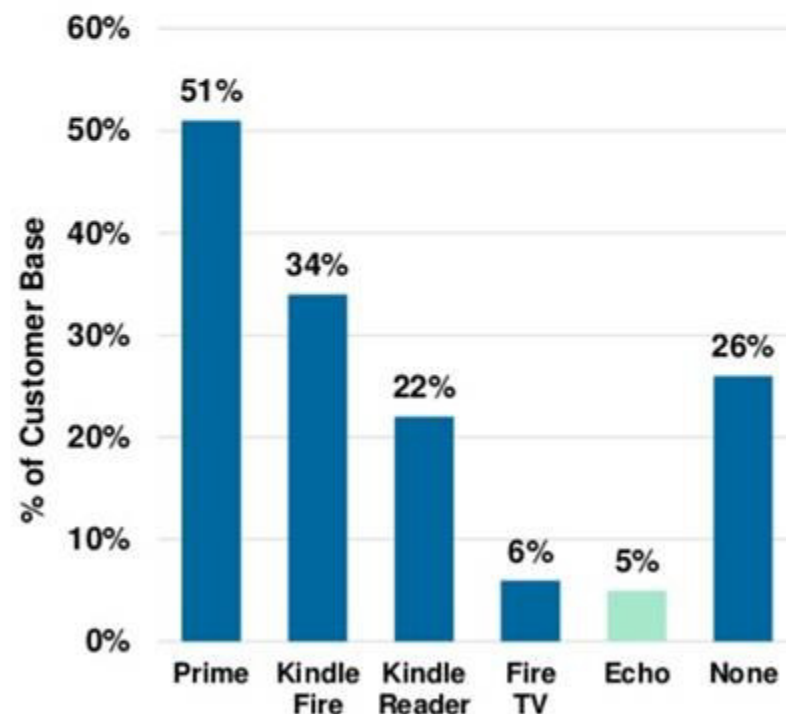
~5% of Amazon USA Customers Own an Echo vs. 2% Y/Y...
~4MM Units Sold Since Launch (11/14), per CIRP

~4MM Amazon Echo devices have been sold in USA as of 3/16, with ~1MM sold in Q1:16, per CIRP estimates

Amazon Customer Awareness of Amazon Echo, USA, Q1:15 – Q1:16

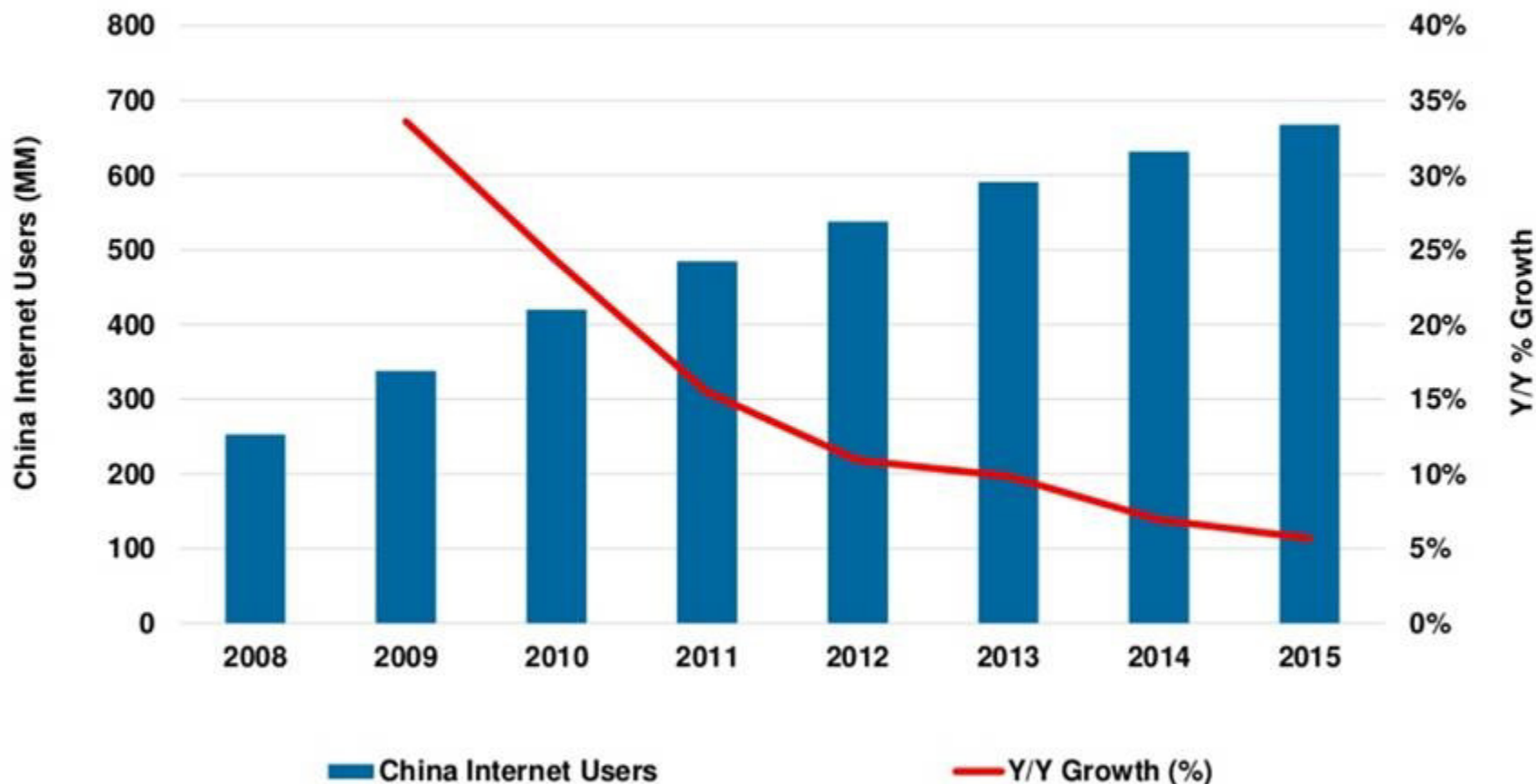


Amazon Customer Ownership of Amazon Devices, USA, Q1:16



China Internet Users = 668MM, +6% vs. 7% Y/Y...@ 49% Penetration

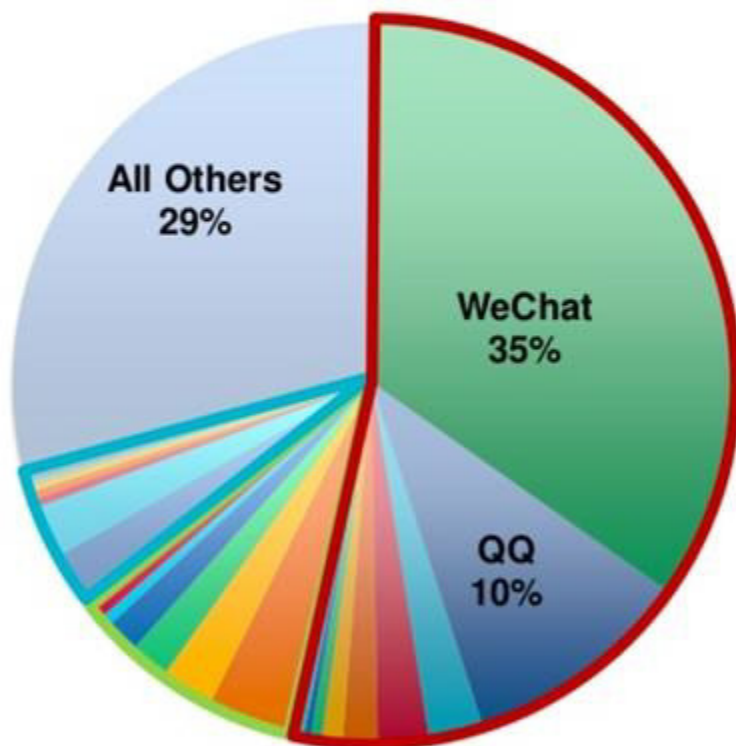
China Internet Users, 2008 – 2015



China Mobile Internet Usage Leaders...

Tencent + Alibaba + Baidu = 71% of Mobile Time Spent

Share of Mobile Time Spent, April 2016
Daily Mobile Time Spent = ~200 Minutes per User, Average



Tencent

- WeChat
- QQ
- QQ Browser
- Tencent Video
- Tencent News
- Tencent Games
- QQ Music
- JD.com
- QQ Reading

Alibaba

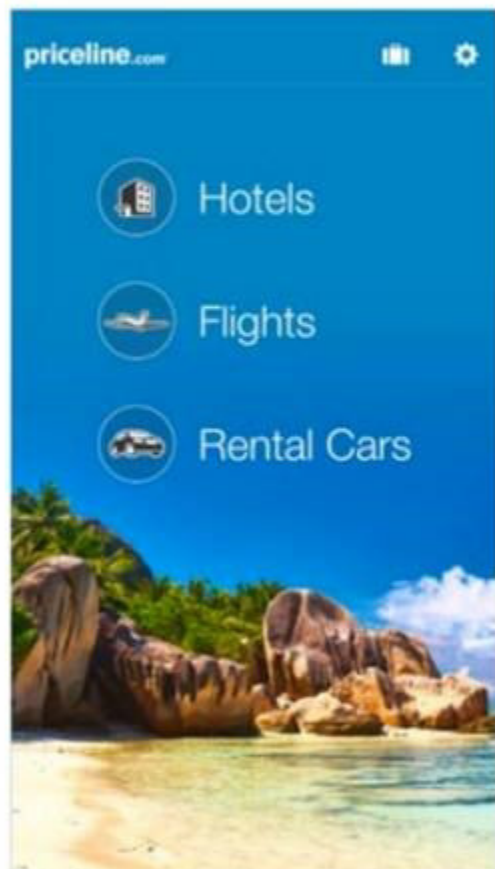
- UCWeb Browser
- Taobao
- Weibo
- YouKu Video
- Momo
- Shuqi Novel
- AliPay
- AutoNavi

Baidu

- Mobile Baidu
- iQiyi / PPS Video
- Baidu Browser
- Baidu Tieba
- 91 Desktop
- Baidu Maps
- All Other

China Travel...Ctrip = Expansive One-Stop-Shop for Travelers...

Priceline App (USA)



Ctrip App (China)

